

# FA's TOP 50 FASTEST-GROWING FIRMS\*

With More Than \$400 Million In AUM

GROWTH RANK	FIRM NAME	LOCATION	2019 CLIENTS	YEAR END 2019 ASSETS (\$MM)*	% GROWTH IN ASSETS 2018-2019	% GROWTH IN ASSETS PER CLIENT
1	DBR & Co.*	Pittsburgh, Pa.	873	6,676.59	1541.80%	1225.85%
2	Arlington Partners**	Birmingham, Ala.	122	5,421.91	280.42%	218.05%
3	Inspire Investing	Hollister, Calif.	640	634.58	152.03%	122.11%
4	Allworth Financial	Sacramento, Calif.	11,208	8,095.77	134.41%	36.97%
5	TC Wealth Partners	Downers Grove, Ill.	657	901.16	124.19%	59.35%
6	Boston Private Wealth	Boston, Mass.	3,126	13,315.70	96.13%	53.34%
7	BFSG	Irvine, Calif.	660	854.14	92.02%	31.51%
8	LeafHouse Financial	Austin, Texas	1,609	9,578.84	91.18%	37.24%
9	Pinnacle Wealth Planning Services	Mansfield, Ohio	723	1,361.98	90.42%	59.08%
10	AE Wealth Management	Topeka, Kan.	42,476	8,583.74	83.06%	22.82%
11	Crestwood Advisors Group	Boston, Mass.	770	3,291.99	82.12%	-9.89%
12	Beacon Pointe Advisors	Newport Beach, Calif.	4,337	9,949.69	80.71%	-46.25%
13	Patton Albertson Miller Group	Chattanooga, Tenn.	267	821.65	78.96%	205.64%
14	Quadrant Capital Group	Cincinnati, Ohio	211	1,476.06	77.96%	3.74%
15	Global Retirement Partners	San Rafael, Calif.	11,689	67,728.45	68.86%	29.64%
16	EP Wealth Advisors	Torrance, Calif.	5,500	6,930.00	68.72%	10.44%
17	William Mack & Associates	Troy, Mich.	508	573.41	67.84%	67.84%
18	Carson Wealth	Omaha, Neb.	4,888	12,552.30	67.30%	-31.55%
19	The Cabana Group	Fayetteville, Ark.	5,191	1,016.41	67.17%	13.97%
20	Axxcess Wealth Management	Carlsbad, Calif.	2,040	1,286.64	65.44%	-29.04%
21	Bartlett Wealth Management	Cincinnati, Ohio	2,019	6,505.30	64.99%	-2.35%
22	Wealth Enhancement Advisory Services	Plymouth, Minn.	16,813	13,820.00	64.92%	27.14%
23	WealthSource Partners	San Luis Obispo, Calif.	1,565	1,192.30	63.26%	62.01%
24	MAI Capital Management	Cleveland, Ohio	1,529	7,166.35	60.68%	1.73%
25	F.L.Putnam Investment Management Co.	Wellesley Hills, Mass.	905	2,785.37	60.40%	1.91%
26	AJ Wealth	New York, N.Y.	218	1,483.00	60.15%	46.19%
27	Titleist Asset Management	San Antonio, Texas	870	536.99	57.97%	39.63%
28	Diversified	Wilmington, Del.	694	507.92	56.81%	44.16%
29	Valley National Financial Advisors	Bethlehem, Pa.	2,125	1,404.08	56.50%	47.44%
30	Kingsview Partners	Grants Pass, Ore.	2,811	1,460.38	55.79%	42.94%
31	Transform Wealth	Greenwood Village, Colo.	1,690	1,233.31	55.38%	-50.63%
32	Ritholtz Wealth Management	New York, N.Y.	1,114	1,298.67	52.79%	-4.41%
33	Belpointe Asset Management	Greenwich, Conn.	4,751	1,591.26	51.60%	8.39%
34	The Colony Group	Boston, Mass.	3,771	11,550.82	51.53%	14.81%
35	Regatta Capital Group	El Segundo, Calif.	698	487.13	50.50%	38.21%
36	Cary Street Partners Investment Advisory	Richmond, Va.	4,513	2,667.37	50.13%	-2.26%
37	CIBC Private Wealth Management	Atlanta, Ga.	7,890	27,072.29	50.00%	44.68%
38	Advisors Capital Management	Ridgewood, N.J.	2,400	3,196.35	49.92%	27.43%
39	Financial Planning and Information Services	De Pere, Wis.	1,000	771.50	49.23%	41.02%
40	GM Advisory Group	Melville, N.Y.	451	2,108.18	48.94%	36.72%
41	MJP Wealth Advisors	Farmington, Conn.	625	622.59	45.69%	31.70%
42	ARGI Investment Services	Louisville, Ky.	3,730	3,120.77	44.30%	32.50%
43	Pinkerton Retirement Specialists	Coeur d' Alene, Idaho	700	645.80	44.15%	39.00%
44	Bahl & Gaynor Investment Counsel	Cincinnati, Ohio	759	15,512.94	43.46%	36.47%
45	SteelPeak Wealth	Woodland Hills, Calif.	1,231	994.06	43.09%	50.41%
46	Blue Chip Partners	Farmington Hills, Mich.	479	767.88	42.99%	27.77%
47	Sowell Management	North Little Rock, Ark.	7,966	3,057.18	42.64%	-0.32%
48	Sather Financial Group	Victoria, Texas	374	832.98	42.11%	40.59%
49	Marcum Wealth	Mayfield Village, Ohio	1,422	1,005.92	41.96%	-17.64%
50	Carroll Financial Associates	Charlotte, N.C.	5,010	3,486.02	41.48%	43.94%

\*Reflects the addition of a large fiduciary retirement plan business. \*\*Reflects several clients' liquidity event.

CARY STREET  
PARTNERS

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